

BTEC Bulletin

News from the Business Transformation Executive Committee

February 2003 - Issue 9

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M Customer Service Standards to Facilitate Program Delivery

At their January meeting, the BTEC endorsed Customer Service Standards for the Management Bureau, a 50 page document that will be updated and revised as needed. This project addresses one of Administrator Natsios' management reform principles of establishing a *customer service culture* in our service organizations to support and facilitate program delivery.

This standards manual will serve as a prototype for the pillar and geographic bureaus, as well as independent offices, in the development of their customer service standards. The M Customer Service Standards Manual is the product of a BTEC working group established in April 2002. The workgroup was led by Joyce Holfeld, GH, and comprised of members from M Bureau offices, independent offices, pillar and geographic bureaus.

The team recommended that the standards be incorporated in Annual Evaluation Forms

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Deob/Reob Quick Hit Results in Critical FM Policy

As a result of the efforts of a BTEC "Quick Hit" work team, ADS 621 has been revised and updated to include new financial management policy guidelines on Deobligation/Reobligation of Unneeded Program Funds. The following new references have been added to ADS 621: Deobligation Guidebook; Reobligation Policy and Procedures; and Frequently Asked Questions (FAQ's) on Monitoring Obligations. The new guidance addresses such issues as: types of obligations and how they are managed and deobligated; and documents PPC/RA's responsibility for providing Agency policy procedures on reobligation as well as for redistributing the deobligated funds (recoveries) to the Bureaus.

One of the first quick hits the BTEC approved in March 2002, this financial management transformation project was a team effort to review the process for deobligating and recovering excess program funds. The BTEC was concerned that unliquidated balances had not been given adequate attention throughout the Agency. Funds that are not deobligated in a timely manner limit the amount of available fiscal resources for Agency use. In June 2002 this quick hit resulted in the BTEC approved agency policy that 50% of deobligated funds are to be returned to the deobligating bureau or mission unless overriding circumstances result in the need to use the money for other purposes. The Administrator or Assistant Administrator decides whether such circumstances exist. This project was directly related to the President's Management Agenda (PMA) goal of Improved Financial Management.

In the near future, the BTEC plans to establish a new series of "quick hits" - short-term, high-potential projects (completed within six months). Quick hits improve services to customers agencywide, contribute to the agency's transformation plan and demonstrate progress towards the President's Management Agenda.

A listing of completed quick hits is available at the

and that managers be held accountable for their implementation.

The M customer service performance standards represent Phase I of a multi-phase effort that concludes with customer service standards for all bureaus within the agency. Phase II, already begun, addresses Pillar Bureau standards and is targeted for completion by June 2003. Standards for the Geographic Bureaus and independent offices should be completed by December 30, 2003. In June 2003, the M Bureau offices will report on compliance with measures or difficulties with these standards.

Minutes of the January meeting can be found on the BTEC web site at <http://inside.usaid.gov/BTEC/>.

BTEC Action Plans Set

The six recently established BTEC subcommittees have developed charters and rolling 90-day action plans. Four subcommittees are directly related to the four components of the Agency transformation plan: Human Resources; Knowledge Management; Strategic Budgeting; and Business Systems Modernization. Enterprise Architecture (EA), a fifth subcommittee, will determine the actions needed to develop a comprehensive blueprint of the Agency's business processes, information flows, information technology and resources. A sixth subcommittee, Capital Planning and Investment Control (CPIC) will establish and administer a process for prioritizing and monitoring information technology investments.

Sub-committees are comprised of BTEC members as well as representatives from Washington organizations and virtual members from field missions.

Your comments and suggestions are welcomed. Please contact your bureau's BTEC member, the acting PMO Program Manager, Bernie Mazer, or online at <http://inside.usaid.gov/BTEC/>

Did you know...

.....that USAID is a partner agency on 2 of the 24 Federal E-Gov initiatives? Drawing on its success with the Travel Manager system, M/AS is providing resources and staff expertise to the E-Travel project led by GSA to help create a government-wide web-based travel management service. And, M/HR has partnered with OPM on the E-Learning project to facilitate a government-wide, web-based training portal (<http://www.golearn.gov>). The agency is also participating on 7 other inter-agency E-Gov projects. These initiatives fall under PMA goal, *Expanded E-Government*.



The next BTEC meeting is scheduled for March 12th.

BTEC website.

Contracting Officers to Increase Use of Performance-Based Contracts

Tim Beans, Chief Acquisitions Officer, M/OP, briefed the BTEC on agency performance-based contracting at the January meeting. Mr. Beans explained that 20% of USAID contracts over \$25,000 must be performance based in FY03. Performance-based contracts define expected results using formal measurable performance standards and quality assurance plans to gauge success. The competitive sourcing initiative of the President's Management Agenda (PMA) requires that agencies utilize performance-based agreements to the fullest extent possible. Currently the majority of agency contract work is through Indefinite Quantity Contracts (IQC's) utilizing two types of contract formats: cost plus fixed fee and fixed daily rates. Training on performance-based contracting will begin in the near future for both technical staff and contracting officers within USAID. Gloria Steele, DAA/E&E, volunteered the E&E Bureau for a pilot effort.

Transformation Update

- The State and USAID study of joint financial management systems is well under way and should be completed by the end of the February 2003. The purpose of the study is to determine the feasibility of integrating the two agencies' systems in an effort to eliminate redundancies and efficiencies. This study will determine if such collaboration between State and USAID is feasible. As government IT infrastructure continues to change, more and more agencies are collaborating on e-Government projects, a key goal of the PMA initiative for expanding e-Government. This joint study will determine the future of the agency's business system modernization initiative, which is one of four "lanes" in USAID's business transformation plan.
- At the January meeting, Fred Schieck, BTEC Chair, reported that an Overseas Workforce Group would complete its staffing study by the end of April 2003. The working group, led by David Eckerson from PPC, will develop guidelines and criteria for the staffing of positions overseas. Information from this review will be used in budget and workforce planning decisions. This study is directly related to the agency's transformation initiative for Strategic Management of Human Capital that is also one of five goals in the PMA.

More detailed BTEC information can be found at <http://inside.usaid.gov/BTEC>.